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TRAVEL PRINTOUT

Supported by a grant from Travel Industry Association of America

Research News for the U.S. Travel Industry

U.S. Travel Data Center

July 1985 Volume 14, Number 7

NOTED FUTURIST TO ADDRESS TRAVEL OUTLOOK FORUM

Noted futurist Joseph F. Coates will examine the impact of emerging technology, demographic trends and global integration on the future of travel and tourism at the U.S. Travel Data Center's eleventh annual Travel Outlook Forum, September 20, 1985 at the New Orleans Hilton Riverside and Towers.

Coates, president of a policy research organization specializing in research management, policy analysis and technology assessment, will provide the luncheon address at the forum. He is former head of exploratory research for the Congressional Office of Technology Assessment, is the author of over 100 articles, papers and publications and holds 19 patents.

The Travel Outlook Forum, for eleven years the travel industry's annual forecasting conference, will again be co-sponsored by the Travel and Tourism Research Association (TTRA). For the second year, the forum will be held in conjunction with the Travel Industry National Conference & Marketing Showcase, sponsored by the Travel Industry Association of America (TIA).

Registration fee for the forum is $175 for TTRA, TIA and Data Center members, and $200 for others. Special discounts for attending both the forum and the Conference & Showcase are also available.

The Travel and Tourism Research Association is the international association of travel research and marketing professionals. The Travel Industry Association is the national nonprofit trade association representing all components of the travel and tourism industry.

For more information about the Travel Outlook Forum, contact Ida Simmons, U.S. Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036, or call 202/293-1040. ##

U.S. TRAVEL DATA CENTER NAMES MARKETING COUNSEL

Dr. Douglas C. Frechtling, director of the U.S. Travel Data Center, named Hershel Sarbin Associates, Inc., as marketing counsel for the U.S. Travel Data Center.

In this capacity, Hershel Sarbin Associates will assist in the formulation, marketing and analysis of the Data Center's survey research on travel markets.

In announcing this affiliation, Dr. Frechtling stated, "The marketing and analytical capabilities of Hershel Sarbin Associates admirably complements the Data Center's unique travel market survey programs. I believe this relationship will markedly improve the Data Center's ability to meet the research needs of the travel and tourism industry."

Hershel Sarbin Associates, Inc., a management consulting firm specializing in travel and leisure, provides marketing and management counsel to the travel industry. In this capacity, the firm has advised numerous businesses and government agencies on travel marketing issues. ##

TRAVEL PRICES ADVANCE IN MAY

Soaring lodging and gasoline prices raised the cost of travel in May by 1.0 percent according to the U.S. Travel Data Center's Travel Price Index (TPI).

For comparison, the cost of consumer goods as measured by the Consumer Price Index (CPI) grew 0.4 percent in May.

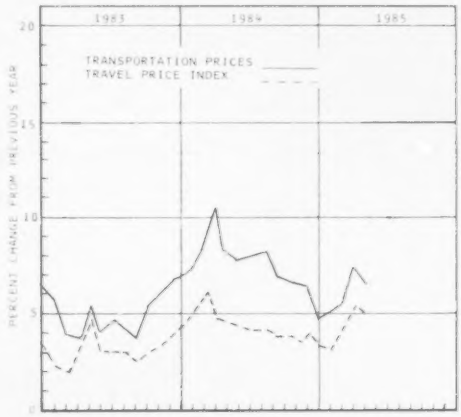
The TPI, which measures changes in the seasonally unadjusted cost of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in this country, rose to 381.4 in May (1967=100).

The cost of lodging while out of town jumped 2.1 percent over the previous month followed by a rise in gasoline prices of 2.0 percent. Intercity bus fares increased 0.6 percent.

After three months of steady prices, intercity railroad fares dropped 0.8 percent, and the cost of incidental items fell 0.1 percent. Taxicab fares were unchanged for the second straight month.

The TPI has risen 5.0 percent since May 1984, slowed by a 4.1 percent decrease in gasoline prices, while the CPI has increased 3.7 percent during this period.

Airline fares have increased 7.6 percent over the previous year. The costs of lodging, entertainment commodities, and intercity bus fares have posted increases greater than 6 percent since May of last year. ##



Monthly and Annual Rates of Change in the Travel Price Index and Components, May 1985

TPI Component	Monthly Percent Change April 1985 to May 1985	Annual Percent Change May 1984 to May 1985
Transportation	0.9	2.1
Airline Fares	0.1	7.6
Intercity Bus Fares	0.6	6.2
Intercity Train Fares	- 0.8	3.6
Taxicab Fares	0.0	2.7
Gasoline	2.0	- 4.1
Lodging	2.1	6.8
Food Away From Home	0.3	3.8
Entertainment Services	0.3	6.5
Incidentals	- 0.1	3.0
TRAVEL PRICE INDEX	1.0	5.0
CONSUMER PRICE INDEX	0.4	3.7

Source: U.S. Travel Data Center and U.S. Bureau of Labor Statistics

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research, 1899 L Street, N.W., Washington, DC 20036. Telephone number, (202) 293-1040. Dr. Douglas C. Frechtling, Director. Ida Simmons, Editor. ISSN: 0744-6233.

TRAVEL PRINTOUT reports on the results of Data Center projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are available for $49 per year, U.S., Canada and Mexico; other foreign countries, $59 per year, payable in U.S. funds only.

TRAVEL BY AMERICANS DROPS SLIGHTLY IN FEBRUARY

Travel during February fell 3 percent below year-earlier levels, according to the U.S. Travel Data Center's latest National Travel Survey results.

Following a 13.0 percent leap in January, travel by Americans totaled 43.9 million person-trips in February 1985, down from 45.3 million one year earlier. (A person-trip is measured each time anyone goes 100 miles or more away from home.)

The monthly telephone survey reported that vacation travel grew 2 percent over that for February 1984. Travel for business or convention purposes posted the largest increase of any travel component for the month, with a gain of 20 percent. Weekend travel, after strong increases in January, posted a moderate rise of 5 percent. On the negative side, travel for personal/family business and "other" purposes fell sharply.

Travel by auto/truck/RV declined, while air travel rose substantially over 1984 levels.

Average round-trip distance increased from 920 miles one year ago to 990 in February 1985; however, average trip duration fell slightly, from 5.8 nights to 5.4 nights away from home.

The survey also showed vacation travel intentions for the next six months (March through August 1985) increased 4 percent over February 1984. Of those planning a vacation trip, 57 percent intend to travel by personal motor vehicle, and 30 percent said they would travel by air.

Plans to use commercial lodging increased 20 percent and comprised 43 percent of the total, while the number of travelers planning to stay with friends and relatives declined 5 percent. The average duration of these intended vacation trips is 8.4 nights, down from 9.1 nights in February 1984. ##

BRIEFS

Bob LeBlanc, former chairman of the U.S. Travel Data Center and assistant secretary for tourism in the Louisiana Department of Culture, Recreation and Tourism, received the French National Order of Merit on July 13.

LeBlanc received the award for [redacted] years' work with the France-Louisiane Association, a Paris-based organization which seeks to enhance the image of both France and Louisiana and to perpetuate French history, heritage and language.

"This is without question one of the highlights of my career," LeBlanc said in reference to being a recipient of the Order. "I could not accept it, however, without doing so on behalf of the Louisiana Office of Tourism staff who certainly share this great honor with me along with so many other people who have played significant roles in my life."

The National Order of Merit is given for distinguished merit either in civil or military office or for special services rendered in private enterprises. ##

The U.S. Travel Data Center will release a detailed description of research services specially developed for state travel offices next month.

Travel Marketing and Impact Studies Especially for State Travel Offices, a 25-page guide to taking advantage of the Data Center's special research services and unique capabilities, features a new service: the advertising conversion study. This study, designed to measure the effectiveness of a state's travel advertising program, combines telephone surveys and economic studies to provide a measure of the impact and cost-effectiveness of travel promotion activites.

Travel Marketing and Impact Studies will be mailed to directors of state travel offices. For further information, call Ida Simmons, the Data Center's manager of communications, 202/293-1040. ##

States comprising the Census regions:

NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. MIDDLE ATLANTIC: New Jersey, New York, Pennsylvania. SOUTH EAST: Alabama, Delaware, Florida, Georgia, Kentucky, Maryland, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, West Virginia. EAST NORTH CENTRAL: Indiana, Illinois, Michigan, Ohio, Wisconsin. WEST NORTH CENTRAL: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. WEST SOUTH CENTRAL: Arkansas, Louisiana, Oklahoma, Texas. MOUNTAIN: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. PACIFIC: Alaska, California, Hawaii, Oregon, Washington.

CURRENT TRAVEL INDICATORS

	Current Month	Current Value	Percent Change From Previous Month	Percent Change From Year-ago Month	Percent Change Year-to-date 1985/84
Establishment receipts or retail sales					
Hotels, motels and other lodging places(1)		N/A	N/A	N/A	N/A
Eating and drinking places(2)	Apr	$10,669 million	- 0.9	4.8	5.1
Gasoline service stations(2)	Apr	$ 8,693 million	3.0	0.9	- 1.3
Commercial lodging demand					
Hotel/motel occupancy rate(3)	Apr	70.7 percent	8.6	- 0.5	- 0.9
Real demand for commercial lodging(4)		N/A	N/A	N/A	N/A
Airline passenger traffic(5)					
Domestic revenue passenger-miles	Apr	16.4 billion	-20.1	- 1.4	9.4
International revenue passenger-miles	Apr	7.3 billion	70.3	76.9	26.4
Highway traffic volume(6)					
Rural arterial vehicle-miles	Apr	37.5 billion	2.6	4.6	3.4
Rail passenger traffic(7)					
Amtrak passenger-miles	Apr	399.6 million	6.2	9.9	3.7
Travel Price Index(8)	Apr	377.4	1.4	4.5	3.8
U.S. resident travel(9)					
Total person-trips	Mar	67.2 million	53.1	27.5	13.2
Vacation person-trips	Mar	41.7 million	69.5	16.2	15.6
Total person-nights	Mar	349.4 million	47.4	30.0	5.1
Vacation person-nights	Mar	233.5 million	43.8	12.2	- 0.6
Public use of national parks(10)					
Visits	Apr	21,252,176	39.3	25.9	14.9
Overnight stays	Apr	915,938	41.7	12.1	3.7
Foreign arrivals in U.S.(11)					
From overseas	Mar	718,376	27.1	16.2	7.4
From Canada	Apr	923,885	- 2.4	-13.8	- 7.7
U.S. citizen departures(11)					
To overseas	Mar	1,149,107	32.1	6.2	3.7
To Canada	Apr	569,375	25.7	1.6	0.1
Domestic demand for motor gasoline(12)					
Barrels per day	Apr	6,931 thousand	4.6	-3.7	2.7

N/A = not available

(1)Source: Laventhol and Horwath, seasonally unadjusted. (2)Preliminary; adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3)Source: Laventhol and Horwath, seasonally adjusted. (4)Source: Laventhol and Horwath, unadjusted expenditures for commercial lodging adjusted for inflation since 1972. (5)Preliminary; U.S. scheduled service air carriers. Source: U.S. Department of Transportation. (6)Source: Federal Highway Administration. (7)Source: National Railroad Passenger Corporation (Amtrak). (8)Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9)Source: U.S. Travel Data Center. (10)Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (11)Source: Statistics Canada and Nettleton Travel Research Center. (12)Preliminary; Source: U.S. Department of Energy.

U.S. Travel Data Center

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Washington, D.C.
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PERMIT NO. 8523
WASHINGTON, D.C.

July 1985

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Jeanne Long
Congressional Information
Service
4520 East-West Hwy., Ste. 800
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1984 TRAVEL VOLUME FAILS TO SURPASS YEAR-EARLIER LEVELS

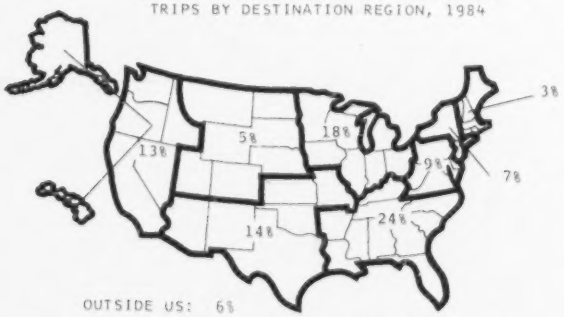
Although both vacation and business/convention travel rose in 1984, travel overall fell 4 percent from 1983 levels, according to the U.S. Travel Data Center's 1984 National Travel Survey Full Year Report.

The report, which summarizes results of the Data Center's monthly National Travel Survey conducted in 1984, reveals that 69 percent of all Americans traveled away from home in 1984, producing 1.01 billion person-trips. (A person-trip is measured each time anyone goes 100 miles or more away from home.)

With the exception of May and October, travel by Americans did not exceed the 1983 levels; however, vacation travel grew 7 percent in 1984, after a 3 percent decline the previous year.

While business/convention travel rose 7 percent, travel for "other pleasure" such as outdoor recreation, sightseeing and entertainment, fell 13 percent. Travel to visit friends and relatives remained unchanged from 1983.

PERCENT DISTRIBUTION OF TOTAL PERSON-TRIPS BY DESTINATION REGION, 1984



OUTSIDE US: 6%

TOTAL: 1,012.0 MILLION PERSON-TRIPS

Travel by air increased its market share from 16 percent of total travel in 1983 to 17 percent. However, travel by auto/truck/RV dropped 6 percent.

The South was the most popular region for American travelers, as in the previous two years, capturing 24 percent of the 1984 U.S. travel market. Travel to the Eastern Gateway grew the most in 1984, up 11 percent. The greatest number of travelers came from the Great Lakes Country, which produced 24 percent of all travelers, followed by The South, which generated 20 percent.

The 1984 National Travel Survey Full Year Report is based on telephone interviews with over 1,500 adult Americans each month in 1984. It includes over 100 pages of tables, charts, analysis and comparisons with 1983. It has been sent to Data Center members and is available to others for $100.00 prepaid from the U.S. Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036. ##

TRAVEL OUTLOOK FORUM WILL EXAMINE BUSINESS TRAVELER MARKET

Experts from several sectors of the travel industry will join the U.S. Travel Data Center's eleventh annual Travel Outlook Forum to discuss opportunities for growth in the business traveler market on September 20, 1985, at the New Orleans Hilton Riverside and Towers.

Hershel B. Sarbin, marketing consultant for the Data Center and chairman of Hershel Sarbin Associates, Inc., will moderate the panel of three travel industry experts who will present the prospects for growth in business travel from the airline and hotel perspectives as well as from the broad industry viewpoint.

Panelists include Joseph P. Sullivan, divisional vice president--marketing and advertising of National Car Rental System; Jennifer Armstrong, manager of market research for Trans World Airlines; and Valerie Dow, associate publisher of the Hotel and Motel Red Book.

(Continued on page 3)

PRICES EXPAND IN JUNE

Soaring lodging prices raised the cost of travel in June by 0.8 percent according to the U.S. Travel Data Center's Travel Price Index (TPI).

For comparison, the cost of consumer goods as measured by the Consumer Price Index (CPI) grew 0.3 percent in June.

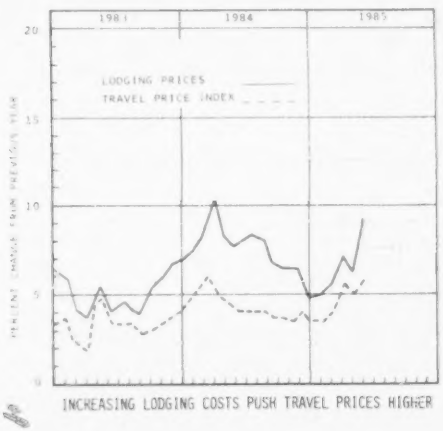
The TPI, which measures changes in the seasonally unadjusted cost of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in this country, climbed to 384.5 in June (1967=100).

The cost of lodging while out of town jumped 1.7 percent over the previous month. The costs of gasoline and entertainment services each gained 0.8 percent. Intercity train fares rose 0.7 precent, the first increase in five months.

The prices of incidental items remained unchanged in June.

The TPI has grown 5.9 percent since June 1984, compared to a 4.1 percent increase in the CPI.

Lodging prices gained the most, up 9.0 percent over the previous year, followed by a 7.6 percent increase in intercity bus fares. Railroad fares grew the least, 2.2 percent. ##



INCREASING LODGING COSTS PUSH TRAVEL PRICES HIGHER

Monthly and Annual Rates of Change in the Travel Price Index and Components, June 1985

TPI Component	Monthly Percent Change May 1985 to June 1985	Annual Percent Change June 1984 to June 1985
Transportation	0.5	4.4
Airline Fares	0.2	5.8
Intercity Bus Fares	0.5	7.6
Intercity Train Fares	0.7	2.2
Taxicab Fares	0.3	2.7
Gasoline	0.8	2.6
Lodging	1.7	9.0
Food Away From Home	0.5	4.1
Entertainment Services	0.8	6.9
Incidentals	0.0	3.3
TRAVEL PRICE INDEX	0.8	5.9
CONSUMER PRICE INDEX	0.3	4.1

Source: U.S. Travel Data Center and U.S. Bureau of Labor Statistics

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TRAVEL SHOWS STRONG INCREASES IN MARCH

Travel during March soared 28 percent from year-earlier levels, according to the U.S. Travel Data Center's latest National Travel Survey results.

Following a slight decline in February, travel by Americans rose from 53 million person-trips in March 1984 (unusually low because of bad weather in many parts of the country and an April Easter weekend) to 67 million a year later. (A person-trip is measured each time anyone goes 100 miles or more away from home.)

The monthly telephone survey reported that vacation travel climbed 16 percent from the level set in March 1984.

Pleasure travel, such as visiting friends or relatives, sightseeing, or other entertainment purposes, grew 24 percent from the previous year, and business/convention travel continued to rebound.

The average trip duration rose to 5.2 nights in March 1985 from 5.1 nights one year earlier, while round trip distance grew from 880 miles in March 1984 to 990 miles a year later.

The number of U.S. adults planning vacation trips in the next six months (April through September 1985) decreased 1 percent from the previous year.

Of those planning a trip, 66 percent said they would travel by personal motor vehicle, a 4 percent increase from 1984 levels, while 32 percent plan to travel by air, an increase of 9 percent. Forty-two percent plan to use commercial lodging, and 46 percent intend to stay with friends or relatives. ##

(CONTINUED FROM PAGE 1)

The Travel Outlook forum is co-sponsored by the Travel and Tourism Research Association (TTRA), and will be held in conjunction with the Travel Industry National Conference & Marketing Showcase, sponsored by the Travel Industry Association of America (TIA).

Registration fee for the forum is $175 for TTRA, TIA and Data Center members, and $200 for others. Special discounts for attending both the forum and the conference & showcase are also available.

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For more information about the Travel Outlook Forum, contact Ida Simmons, U.S. Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036, or call 202/293-1040. ##

WORLDWIDE LODGING SHOWS SLIGHT PROFITABILITY DECLINE

Despite a disparity in international exchange rates, profitability for the worldwide lodging industry declined only slightly in 1984, from 8.6 percent in 1983 to 8.3 percent, according to Horwath & Horwath International's Worldwide Lodging Industry 1985.

This decline could actually reflect a profitability increase when measured by the local currency standard and not in U.S. dollars, said Jonathan Bodlender of Horwath & Horwath (U.K.) London.

Although worldwide lodging occupancy levels improved strongly in 1984, rising 3.7 percent to 67 percent, room rates declined substantially, primarily due to the strength of the U.S. dollar.

The full study, Worldwide Lodging Industry 1985, is available on written request for $65.00 per copy from Laventhol & Horwath, Publications Dept., 1845 Walnut Street, Philadelphia, PA 19103.

Horwath & Horwath International is an independent accounting and management consulting firm. ##

Plan to attend the Data Center member meeting at the Travel Industry National Conference & Showcase
Wednesday, September 18, 1985
8 a.m. - 9 a.m.
Prince of Wales Room
New Orleans Hilton Riverside and Towers

States comprising the Census regions:

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CURRENT TRAVEL INDICATORS

	Current Month	Current Value	Percent Change From Previous Month	Percent Change From Year-ago Month	Percent Change Year-to-date 1985/84
Establishment receipts or retail sales					
Hotels, motels and other lodging places(1)		N/A	N/A	N/A	N/A
Eating and drinking places(2)	May	$11,075 million	2.4	8.9	6.1
Gasoline service stations(2)	May	$ 8,764 million	- 0.2	1.7	- 0.5
Commercial lodging demand					
Hotel/motel occupancy rate(3)	May	67.9 percent	- 6.9	- 3.1	- 1.4
Real demand for commercial lodging(4)		N/A	N/A	N/A	N/A
Airline passenger traffic(5)					
Domestic revenue passenger-miles	May	19.1 billion	17.0	13.8	10.3
International revenue passenger-miles	May	5.5 billion	-25.0	16.0	23.9
Highway traffic volume(6)					
Rural arterial vehicle-miles	May	39.9 billion	6.6	4.3	3.6
Rail passenger traffic(7)					
Amtrak passenger-miles	May	425.0 million	6.4	10.4	5.2
Travel Price Index(8)	May	381.4	1.1	5.0	4.1
U.S. resident travel(9)					
Total person-trips	Apr	74.4 million	10.7	0.5	9.1
Vacation person-trips	Apr	45.1 million	8.2	- 8.9	7.1
Total person-nights	Apr	357.1 million	2.2	7.2	5.7
Vacation person-nights	Apr	248.1 million	6.3	2.3	0.3
Public use of national parks(10)					
Visits	May	27,563,480	29.7	16.1	15.3
Overnight stays	May	2,100,206	44.9	-33.9	-13.4
Foreign arrivals in U.S.(11)					
From overseas	Apr	659,515	- 8.2	-10.1	2.4
From Canada	May	825,700	-10.6	- 4.1	- 7.0
U.S. citizen departures(11)					
To overseas	Apr	1,144,078	- 0.4	8.7	5.0
To Canada	May	1,015,903	78.4	9.8	3.5
Domestic demand for motor gasoline(12)					
Barrels per day	May	7,036 thousand	1.5	2.4	2.6

N/A = not available

(1)Source: Laventhol and Horwath, seasonally unadjusted. (2)Preliminary; adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3)Source: Laventhol and Horwath, seasonally adjusted. (4)Source: Laventhol and Horwath, unadjusted expenditures for commercial lodging adjusted for inflation since 1972. (5)Preliminary; U.S. scheduled service air carriers. Source: U.S. Department of Transportation. (6)Source: Federal Highway Administration. (7)Source: National Railroad Passenger Corporation (Amtrak). (8)Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9)Source: U.S. Travel Data Center. (10)Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (11)Source: Statistics Canada and Nettleton Travel Research Center. (12)Preliminary; Source: U.S. Department of Energy.

U.S. Travel Data Center

1899 L Street, Northwest
Washington, D.C. 20036
(202) 293-1040

August 1985

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WASHINGTON, D.C.

TRAVEL PRINTOUT

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Jeanne Long
Congressional Information Service
4520 East-West Hwy., Ste. 800
Bethesda MD 20814

10/11/85 R9375-1

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Supported by a grant from Travel Industry Association of America

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U.S. Travel Data Center

September, 1985 Volume 14, Number 9

FORUM EXAMINES AMERICAN TRAVEL MARKETS

This could be the best growth year for travel since 1981, Dr. Douglas C. Frechtling, director of the U.S. Travel Data Center, told the eleventh annual Travel Outlook Forum in New Orleans.

The forum, a premier industry event since 1975, was co-sponsored by the Travel and Tourism Research Associaton and this year addressed the theme, "Uncovering Opportunities in Dynamic American Travel Markets."

According to Frechtling, a frequently quoted authority on travel and tourism, real travel industry output in the first half of 1985 rose 4.7 percent over levels posted in the first six months of 1984. Low travel price inflation and rising disposable personal income contributed significantly to the overall gain, Frechtling said.

Domestic air traffic has increased by more than 13 percent so far this year, continuing a steady rise since the extraordinary fuel price and fare increases of 1980. "For the first time on record, common carriers account for 24 percent of total intercity passenger-miles. This is a dramatic increase over their 17 percent share ten years ago," Frechtling explained.

Quoting results of the Data Center's 1985 National Travel Survey, Frechtling said U.S. resident travel during first-half 1985 rose 9 percent over the same period in 1984, totaling 456 million person-trips (one person traveling 100 miles or more away from home). "This is a welcome change from the declines we have experienced over the last three years," he added.

According to the monthly telephone survey of national probability samples of 1,500 adults, Americans spent 2.3 billion nights away from home during the first six months this year, an increase of 7 percent.

Vacation person-trips have risen 8 percent so far this year. Winter vacation travel, after a strong start, slowed considerably during the very cold February. May travel was very strong, but apparently at the expense of June, when travel rose only 1 percent over last year. "But preliminary estimates suggest July and August will show more impressive increases," Frechtling added.
(Continued on page 3)

DATA CENTER, TRAVEL WEEKLY LAUNCH SURVEY OF BUSINESS TRAVELERS

This month marks the beginning of the first comprehensive ongoing survey of all segments of the business travel market, Travel Weekly and the U.S. Travel Data Center announced recently.

The study will be conducted for Travel Weekly through the Data Center's National Travel Survey, a monthly telephone survey of 1,500 U.S. adults, which will contact 3,600 business travelers throughout the next year. The survey will provide business traveler demographics and business trip characterisics such as frequency and duration, mode of transportation, and factors affecting selection of airlines, hotels and rental cars.

Periodically the survey will also include a varying set of "focus" questions, asking information on such topical subjects as corporate travel departments and participation in frequent traveler programs.

Results of the Survey of Business Travelers will be incorporated into Travel Weekly's coverage of the travel industry for its readers and advertisers. The publication's sponsorship
(Continued on page 3)